The Economic and Fiscal Impact of Carlsbad's Beaches: A Survey and Estimate of Attendance

Philip G. King, Ph.D.
Chair, Economics Department, San Francisco State University

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Executive Summary

This study was commissioned by the City of Carlsbad to analyze beach tourism. It presents the results of a comprehensive survey of beach visitors in high season, an estimate of beach attendance and total spending related to beach tourism in the City and the region.

- 83% of beach visitors were not City residents, though half lived within 20 miles. 26% came from outside California.
- Among amenities, beach cleanliness was rated most important (82% said it was very important), while 43% said wide beaches were very important and 55% said parking was very important.
- Respondents ranked Lifeguard services, Carlsbad Village, and other amenities lower.
- If Carlsbad's beaches eroded 50% (were half as wide), beach attendance would drop by 28%.
- 40% of visitors stay overnight; 58% of people staying overnight responded that the beach was "very important" for their trip/vacation.
- The typical visitor spent $66 per person per day, 2/3 ($44) of which is spent in Carlsbad. Overnight visitors spent far more than day-trippers. Lodging was the largest spending category at $26 per person per day (averaged over all visitors).
- Beach tourism generates $94,000 in sales tax revenues and $1.4 million in Transient Occupancy Tax.
- For the State as a whole, beach tourism generates just under $2 million in sales tax revenues and parking fees.
- This study also developed a methodology to count people at the beach—just under 600,000 people attend Carlsbad's beaches in high season.
- Since most of the beach is operated by State Parks, the cost to the City of Carlsbad is minimal, while the beach generates millions in revenue and income for Carlsbad's citizens. Maintaining beach width and cleanliness should be a clear goal for the City, since respondents indicated that narrowing of the beach would lead to lower attendance and that cleanliness was critical.
- This study provides an estimate of attendance and suggestions for future work. The most cost effective way to collect data would be to work with State Parks, which already collects attendance data for approximately 90% of visitors.
- The estimates provided in this report are extremely conservative. This reports attendance estimate is significantly lower than the official estimates provided by State Parks. Also, the report only considers the economic impact from people who are actually on the beach. The existence of the beach also increases property values (and hence property taxes), employment, and other economic activity.

I. Introduction

This study was commissioned by the City of Carlsbad, specifically the Beach Preservation Committee, to analyze beach tourism at beaches within the City's limits. The study will present the results of a comprehensive survey of beach visitors in high season. It also presents an estimate of beach attendance at these beaches in high season. The results of the survey and of the attendance estimate will also be used to estimate total spending related to beach tourism in the City and the region.

Although the beach represents a continuous strip of sand, except for a narrowing between Cannon Road and Palomar Airport Road, it is, in fact, divided into several beaches with different jurisdictions. The northern part of the beach, from the Oceanside border to the Army-Navy Academy is bordered by a largely residential area, though some condos here are rented in the summer. This part of the beach is less populated though one can still find several dozen people on the beach in high season, as well as walkers in the morning. As one moves south from the Army-Navy school to the northernmost lifeguard tower, near Carlsbad village, the beach population becomes increasingly denser. The southern part of this reach is, along with Ponto, the most densely populated part of the beach. Here, a number of commercially rented condos have been built along with a hotel. Public access is also available along with reasonable parking.

Starting with the northernmost lifeguard tower (#28) near Carlsbad Village Drive, the beach is run by the California State Parks system and lifeguard towers, run by the State, are posted periodically down to the lagoon ("warm water"). Beach goers cluster around access points and parking. From just south of the lagoon to tower #11 the beach population is sparse and many areas are eroded and have only private access. From tower #11 down, the population again increases. Many people here are campers camping at South Carlsbad State park. The population clusters near lifeguard towers, especially #9, #8, and #6, which also correspond to access points. From tower #4 south, the visitor population shifts again to locals, who park nearby. The population between tower #2 and tower #1 is very dense at "Ponto" beach, most likely due to easy parking and a wide beach. The beach continues into Encinitas with no clear dividing line except for a small sign.

II. Beach Survey

In order to obtain information on the types of visitors coming to Carlsbad's beaches, their behavior, and their preferences, I created a survey instrument and presented a preliminary four page instrument, consisting largely of closed-end questions, to Steven Jantz, Associate Engineer for Carlsbad. I next met with the Beach Preservation Committee and a number of City officials as well as officials from California State Parks. I made a number of modifications to the scope and purpose of the survey based on the feedback from the visit to Carlsbad. The resulting survey instrument was tested in mid-June on 40 beach visitors. Subsequently, a small number of changes were made and the final instrument was used for the survey.

Surveys were conducted in June, July and August, including the July 4th weekend. Every effort was made to create as representative a sample as possible and respondents were given no information which might bias the results. Beach visitors were chosen at random[1] and asked to fill out the survey on-site, which yields much higher participation rates than other survey methodologies. The survey was conducted on weekdays, weekends, cloudy days and sunny days, in proportion to the number of people on the beach on those days. The response rate was high—approximately 85% of people asked to participate agreed to do so. This result is encouraging since non-participation can lead to survey bias if non-respondents are different from respondents. Complete results of the survey are presented in Appendix 1 at the end of the report.

On each survey the day, time and location were noted beforehand. To determine location, the beaches were divided into the following reaches:

- **Reach 1a**: From the most northern part of Carlsbad beach (St. Malo) to the south end of the Army Navy Academy (http://www.army-navyacademy.com/).
- **Reach 1b:** From the south end of the Army Navy academy to the first lifeguard tower (#28).
- **Reach 2**: From the first lifeguard tower (#28) to the north end of the Encina Power Station.
- **Reach 3**: From the north end of the Encina Power Station to the north end of Carlsbad State beach.
- **Reach 4**: (S. Carlsbad State Beach) From the north end of S. Carlsbad State beach to the north of Ponto Beach (lifeguard tower #4).
- **Reach 5a**: ("Ponto Beach"): Lifeguard Tower #4 to #2.
- **Reach 5b**: ("Ponto Beach"): From lifeguard tower #2 to the sign for the Carlsbad Encinitas border which is about 20-30 yards south of lifeguard tower #1
- **Reach 5c**: ("Ponto Beach"): From the sign for the Carlsbad/Encintas border halfway to the first set of staircases.

The survey was conducted from Reach 1a to 5b. Since 5c is in Encintas, surveys were not taken, but attendance numbers were estimated. Reach 3 is the longest in terms of distance, but has far fewer people than other reaches since access is quite limited in most places. Reach 1a is also sparsely populated. Reaches 1b and 5b are densely populated on busy days. Reach 1 does not have lifeguards and is not part of State Parks.

The survey was administered to 562 people, more than sufficient for reasonable estimates.

[1] The surveyor zigzagged and chose every nth person to answer the instrument.

III. Results of the Survey

This section presents the results of each survey question. Briefly, here are the main results of the survey:

- 83% of beach visitors were not City residents, though half lived within 20 miles. 26% came from outside California.
- 82% came to the beach by car; 17% walked. Half the people who drove had no difficulty parking and only 9% reported having significant difficulty parking.
- The average stay was just over 3 hours, though there was quite a bit of variation.
- Visitors to Carlsbad's beaches also visit other local beaches, and rate Carlsbad, on average, slightly better than other beaches.
- Among amenities, beach cleanliness was rated most important (82% said it was very important), while 43% said wide beaches were very important and 55% said parking was very important. Lifeguard services, Carlsbad Village, and other amenities scored lower.
- If Carlsbad's beaches eroded 50% (were half as wide), attendance would drop by 28%.
- 40% of visitors were staying overnight; reaches 1 and 4 were most likely to have overnight visitors.
- 58% of people staying overnight responded that the beach was "very important" for their trip/vacation.
- The typical visitor spent $66 per person per day, 2/3 ($44) of which is spent in Carlsbad. Overnight visitors spent far more than day-trippers. Lodging was the largest spending category at $26 per person per day (averaged over all visitors).

IV. Attendance Estimate

Attendance was estimated by counting everyone on the beach and in the water for a particular reach at a particular time. Counts were made on several days in June, July and August. Using the survey results, it was possible to develop a methodology for estimating total attendance in a day. On many beaches in California, attendance is conducted utilizing car counts or lifeguard counts conducted midday, typically about noon. In fact, Carlsbad State beach uses precisely this methodology.

The survey asked not only how long people stayed, but when they arrived. Thus it was possible to create a profile of beach attendance throughout the day. As one would expect, the length of stay was also related to time of arrival, with people arriving earlier tending to stay somewhat longer, on average. Table 1 below estimates arrivals and departures as a percentage of peak attendance (100%). Although the peak varies somewhat by day and weather (specifically if cold winds come in the afternoon), the typical peak is between two and three o'clock. Keep in mind this peak is consistent with a peak arrival time around noon, which I observed. "Peak" here refers not to total attendance for the day, but the maximum attendance at any one time, which is much easier to observe.

Table 1: Peak Attendance on a typical day by time of day

Time	% of Peak	% of peak who arrived earlier	Est Arrivals as % of peak
Before 9 am	10%	0	10%
9-10 am	20%	7.5%	12.5%
10-11 am	33%	16.5%	16.5%
11-noon	60%	27.5%	32.5%
noon-1pm	80%	47.7%	32.3%
1-2pm	95%	63.7%	31.3%
2-3pm	100%	70.7%	29.3%
3-4 pm	95%	71.9%	23.1%
4-5 pm	90%	66.7%	23.3%
5-6pm	70%	81.0%	13.3%

Using the survey data and a model of arrivals and departures, it is also possible to estimate how the beach count at any particular time relates to the total number of people on the beach on a given day. Essentially, one multiplies the beach count at a particular time (e.g., noon-1) by the respective factor in Table 2 (e.g., 2.8). The most reliable counts should be taken between 11 and 4pm, preferably between 1pm and 3pm. For example, if one counts 100 people on reach 1b between noon and 1pm, one should multiply this number by 2.8 to estimate the total number of people on the beach—in this case 280.

Table 2: Ratio of Total Daily Attendance/Beach Count at a particular Time

Time	
Before 9 am	22.4
9-10 am	11.2
10-11 am	6.8
11-noon	3.7
noon-1pm	2.8
1-2pm	2.4
2-3pm	2.2
3-4 pm	2.4
4-5 pm	2.5
5-6pm	3.2

Using the methodology described above and the specific beach counts, I estimated an average attendance on a typical day. While beach attendance did vary depending upon the day and (most importantly) the weather, my counts included a representative sample of weekdays, weekends and sunny and cloudy days in the summer. Table 3 below presents the estimate of total daily attendance. Reaches 1 b (near Carlsbad village) and 5b (Ponto) are the most densely populated, however Reach 4 (S. Carlsbad State Beach) has the most people, though spread out over a much larger area. On a typical summer day, 5430 people visit Carlsbad's beaches.

Table 3: Estimated Average Daily Attendance by Reach in High Season

Reach	Est. Avg. Daily Attendance	% Total
1a	250	5%
1b	1000	18%
2	750	14%
3	330	6%
4	2000	37%
5a	100	2%
5b	1000	18%
5c	250	5%
Total 1a-5b	5430	100%

The high season in summer extends from late May to mid-September, particularly in San Diego County. A reasonable estimate is 110 days. Multiplying the estimate of daily attendance by 110 days yields an estimate for high season attendance of 597,300.

V. Economic Impact

Using the spending data and attendance estimate, one can calculate the economic impact of Carlsbad's beaches for the City and the surrounding region. Table 4 presents the estimate for total spending by category. Average spending is per person per day as reported in the survey. Total spending was estimated by multiplying average spending per day by the number of visitor days. Total spending is just under $40 million.

Table 4: Spending by Category

Category	Avg. Spending		Total Spending	
Gas and Auto	$	7.79	$	4,652,967
Food from Stores	$	11.79	$	7,042,167
Beer, Wine, liquor	$	4.04	$	2,413,092
Sit-down Restaurants	$	11.49	$	6,862,977
Parking	$	1.03	$	615,219
Sundries	$	3.00	$	1,791,900
Lodging	$	26.94	$	16,091,262
Total	$	66.08	$	39,469,584

Table 5 presents spending just for the City of Carlsbad, by category--$26.5 million.

Table 5: Spending in Carlsbad by Category

Category	Avg. Spending in Carlsbad		Total Spending in Carlsbad	
Gas and Auto	$	3.26	$	1,947,198
Food from Stores	$	8.03	$	4,796,319
Beer, Wine, liquor	$	2.40	$	1,433,520
Sit-down Restaurants	$	7.13	$	4,258,749
Parking	$	0.67	$	400,191
Sundries	$	1.41	$	842,193
Lodging	$	21.51	$	12,847,923
Total	$	44.41	$	26,526,093

VI. Fiscal Impact

The beaches are largely maintained by the California State Parks. Reach 1 (not controlled by State Parks) has no lifeguard services and expenditures on public safety are minimal. On the other hand, the spending discussed above does generate substantial revenues--in particular sales tax revenues and Transient Occupancy Tax (TOT) revenues. Using the spending categories above, one can calculate sales taxes to the City of Carlsbad, which represents 1% of all taxable items.[2] Lodging is not subject to sales tax, but is subject to a Transient Occupancy Tax.

For the City of Carlsbad, beach tourism generates $94,000 in sales tax revenues and $1.4 million in TOTs.[3] The data does not allow estimates of increases in property taxes generated by the beach, but it is abundantly clear that the existence of a healthy beach increases property values and hence taxes. In the last fiscal year, the City of Carlsbad generated $28 million in property tax revenues.

For the State of California, beach tourism generates just under $2 million in sales tax revenues and parking fees.

Table 5: Estimated Taxes Directly Generated by Carlsbad's beaches

Local Sales Tax	$	94,409.24
Transient Occupancy Tax	$	1,284,792
Total Carlsbad Taxes	**$**	**1,379,202**
State/Regional Sales Tax	$	1,382,102.92
State Parking	$	615,219.00
Total Direct State Taxes	**$**	**1,997,321.92**

VII. Estimating Future Attendance

This study has devoted a considerable amount of effort to estimating beach attendance at the City's beaches. Given limited resources, there is no perfect way to estimate attendance, but rather a series of compromises based on available data and budget. This section will discuss options for future estimates of beach attendance.

[2] Most food, parking at State Parks and lodging are not subject to sales tax in California.
[3] The sales tax rate for applicable items in Carlsbad is 7.75%; 1% goes to the City. See http://www.boe.ca.gov/news/sp111500att.htm. TOTs are 10% of lodging. Estimated TOTs for the 2005-2006 fiscal year are 10.3 million, see City of Carlsbad, 2005-6 Operating Budget Overview.

A. Using Electronic Counters

The City of Encinitas uses laser counters to estimate the number of people arriving and leaving at various access points. I am currently working with the City of Encinitas to calibrate these counts more accurately and the results of this study this summer will be available shortly. Encinitas is unique in that it has a relatively small number of access points which are sufficiently narrow to use a laser counter. The main exception here is Moonlight beach, which has a counter at the main stairway. I found that most people going to Moonlight beach do not go down the stairs and through the counter. However, there is a fairly stable relationship between those who go through the counter and those that do not. The counters at the northernmost access points (near Ponto beach) tend to significantly over count visitors, possibly because surf boards trip the laser beam in addition to the visitors or possibly due to stair joggers who do not actually go to the beach. There is also one major access point in Encinitas (just south of Carlsbad) which is private—these visitors are not counted by laser counters at present.

The City of Carlsbad's beaches are quite different from Encinitas' in terms of access. While much of Reach 1 and the northern part of Reach 2 also have limited access points suitable for counters, the rest of Carlsbad's beaches are generally less suitable. Further, about half of the people observed entering Reach 1 arrived on the beach through private access points (mostly hotels and condos). Overall, Dr King estimates that only 10-15% of Carlsbad's beach visitors could be measured through counters. While this would provide very interesting data, it would probably not be a good use of the City's resources. However this data would be quite useful for studying attendance patterns, especially if the City used counters that could tell whether visitors were arriving or leaving.

B. State Parks Counts

State Parks does a good job of counting cars that are parked in beach parking lots, both official and unofficial. Their counts include some street parking, though not much north of Carlsbad Village Drive. Lifeguards conduct a count around noon each day and use a methodology to calculate attendance. Visitors who camp are estimated by multiplying camp site attendance by 5.8 in high season. All the data is entered into official forms created by State Parks.

However, the methodology for estimating attendance has not been updated for 25-30 years, according to Richard Dennison, who supervises the counting in Carlsbad for State Parks. The methodology assumes that 1.4 people are in each car, which is lower than what this study's survey data (and other previous studies at beaches in California) indicate. The car count is multiplied by 14 (except at one site) to account for turnover and perhaps cars not counted. The data generated from this study indicates that 14 is to much too high a factor. According to this study's data, the turnover based on a noon count is around three. Even doubling this number and increasing the number of people per car to more reasonable 2.5 or 3 yields a much lower estimate than that obtained by State Parks as detailed below. Indeed, the estimate of beach attendance is about half of State Parks. This is by no means meant to be a criticism of the people at State parks who work in the north San Diego county region. They have been *extremely* helpful to me

throughout this study.[4] Instead, this study indicates that the basic methodology, developed 30 years ago need to be revisited and recalibrated. State Parks also counts camping groups and multiplies by a factor of 5.8 per day in high season. This study did not examine this aspect of their methodology.

Indeed, I believe the city should work more closely with State Parks to estimate attendance for all the City's beaches. Roughly 75% of attendance already falls under their jurisdiction.

C. Periodic Beach Counts

The City could also conduct its own beach counts of people on the beach, as I did. One would not need to count every day, but every attempt should be made to obtain a representative sample. Counts should be made between 1pm and 3pm, which are peak times. Counts at other times are possible, but will be less accurate. The total attendance at a given reach/area can be computed by using Table 2 above.

VIII. Recommendations

This study recommends that the City work with State Parks to accurately estimate attendance. I believe that the car count methodology is reasonably accurate, but needs to be calibrated (downward). Since 80% of the people going to the beach arrive by car, a car count, as conducted by State Parks, would catch most people. One can easily factor in pedestrian visitors by multiplying by the appropriate factor (the survey indicates 1.25. One must also account for people who park in areas not counted. (State Parks does include parking on side streets as well as parking next to the beach.) It is also likely that Reach 1 is undercounted, though State Parks does include some of the parking in this area.

The survey indicates that the average group size is 3.1 people, though it did not specifically ask if all people in one household arrived in the same car. It is likely that some large groups arrived in two or more cars. On the other hand, since the survey focused on households, and multiple households may arrive in one car or van (e.g., family members who do not live in the same house), 3.1 is probably a reasonable number.

However the use of a factor of 14 to multiply the car count by is too high. The survey also indicates that between noon and one, a turnover factor of 2.8 should be utilized. However, this factor does not account for the fact that only 80% arrive by car—one needs to multiply by 1.25. One also needs to estimate the number of cars not counted by car a count, which was beyond the scope of this study. If, for example, only 80% of cars are counted one would multiply by 1.25.

Table 6 compares this study's methodology to the one used by State Parks. For each car, the methodology multiplies by a factor for people per car, people who do not come by car, and cars not counted. The survey from this study provides reliable data on the first two factors, but not the last. Hypothetically, assume that 80% of cars are counted which

[4] In particular, Richard Dennison of State Parks was very helpful.

seems reasonable since the State Parks car counts are fairly comprehensive and include side streets. One should also remember that some cars containing people not going to the beach will be counted, so the adjustment factor could be less than one (or close to one). This methodology also may yield different results are busy days (when most people are on the beach) than on non-busy days (when they may park near the beach but go elsewhere).

Table 6: Two Methods using Car Counts to Estimate Attendance

Factor	State Parks	Our Tentative Suggestion
# Cars	1000	1000
# People per Car	1.4	2.9
People not going by Car		1.25
Cars Not Counted		1.25
Turnover Factor	14	2.8
Total Count Factor incl passengers	19.6	12.7

This study suggests that these factors be calibrated further in conjunction with State Parks. While there is always a temptation to come up with a large number, an accurate number, which is credible and backed by a sound methodology, carries more weight.

IX. Conclusion and Limitations of the Study

This study provides an overview of the composition and preferences of beach visitors to the City of Carlsbad and an estimate of total attendance. It also provides an estimate of the economic and fiscal impact for the City and State. The executive summary at the beginning provides a good overview of this study's findings.

The City of Carlsbad clearly benefits substantially from beach tourism. In particular, a substantial portion of Transient Occupancy Tax revenue is generated by beach tourism and the wider beach should add to property values.

Visitors clearly indicated that clean wide beaches were a prime concern. The City may wish to consider cleaning reach one and perhaps cooperating with State Parks to make sure Ponto is clean. I walked the entire beach many times and did not find it dirty, though the small amount of money it would cost to hire someone to clean reach 1 would likely be worth it. The City has clearly benefited from beach nourishment from SANDAG and it is worthwhile to maintain the beach, since the survey indicated halving the beach width would cause a 29% drop in attendance.

The estimates provided in this report are extremely conservative. This reports attendance estimate is significantly lower than the official estimates provided by State Parks. The previous section explains in some detail the reasons for this discrepancy. The report only considers the economic impact from people who are actually on the beach. However it is

clear from the survey that many people who stay in Carlsbad go because of the beach, but do not go to the beach every day. It is standard practice to only count spending on days when people are actually on the beach, though this methodology in some sense underestimates the true impact of the beach. The existence of the beach also increases property values (and hence property taxes), employment, and other economic activity.

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Appendix 1: Complete Results of Survey

Question 1: How far away from this beach do you live (your primary residence)?

Location	Frequency
In Carlsbad	27.40%
Outside Carlsbad, but within 20 miles	22.90%
Within 60 miles	10.00%
More than 60 miles but in California	13.20%
In the US, but not in California	25.10%
Outside the US	1.40%

Question 2: Including yourself, how many people from your household are here today?

Average response = 3.3 people Median response = 3 people	
Number of People	Frequency
1	18.7%
2	19.4%
3	18.7%
4	25.6%
5-6	12.1%
7-9	3.9%
10-12	1.2%
13 or more	0.4%
Non response	0.0%

Question 2a: Of these people, how many are under 16?

Average response = 1.3 people Median response = 1 person	
Number of People	Frequency
0	34.9%
1	23.7%
2	25.4%
3	9.3%
4	3.9%
5-6	1.2%
7-9	0.4%
10-12	0.0%
13 or more	0.2%
Non response	1.1%

Question 3: How many days this year will you go to a beach in Carlsbad?

Average response = 25.5 days
Median response = 9 days

Number of Days	Frequency
1-3	18.9%
4-7	20.6%
8-10	11.4%
11-14	9.4%
15-21	7.3%
21-28	6.0%
28-50	9.4%
50-100	8.9%
more than 100	7.8%
Non response	0.2%

Question 4: How did you get to Carlsbad Beach today?

Mode of Transportation	Frequency
By car	81.9%
By foot	16.8%
By bicycle	0.4%
By train	0.2%
other	0.7%
Non response	0.0%

Question 4a: If you came by car, how difficult was it to park?

Difficulty in Parking	Frequency
Parking was easy	49.5%
Parking was somewhat difficult	26.5%
Parking was very difficult	8.7%
Non response	15.3%

Question 5: What time did you arrive at the beach today?

Arrival Time	Frequency
Before 9 am	5.5%
9-10 am	9.0%
10-11 am	21.2%
11-noon	21.0%
noon-1pm	18.0%
1-2pm	11.1%
2-4pm	9.2%
After 4pm	4.4%
Non response	0.5%

Question 6: On a typical day, how many hours do you spend at the beach?

Number of Hours	Frequency
Less than 1 hour	17%
2-3 hours	36%
3-5 hours	38%
5-8 hours	8%
more than 8 hours	1%
Total	100%

Question 7: What was your reason for coming to this beach (check one or two)?

Reason	Frequency
To swim	13.8%
So my children could play/swim	30.4%
To surf	8.6%
To hike	0.5%
To hang-out on the beach	45.2%
(other)	1.4%
Non response	0.0%

Other responses: birthday party, bodysurf, bodyboard, camping, kayak, volleyball, read, run, visit family, and lay in the sun.

Question 8: How many days this year will you go to other beaches in California (outside Carlsbad)?

Average response = 11 days Median response = 5.5 days	
Number of Days	Frequency
0	18.7%
1-3	26.5%
4-7	20.8%
8-10	10.5%
11-14	4.6%
15-21	4.8%
21-28	3.6%
28-50	3.2%
50-100	2.5%
More than 100	2.5%
Non response	2.3%

Question 8a: What beach do you go to most often, other than this beach? [See table below question 9 for response.]

Question 9: Please compare the alternative beach you listed above to Carlsbad's beach. We would like you to compare your overall satisfaction including services available at the beach. Please DO NOT consider the time it takes to get to the beach in your rating.

Worse than Carlsbad Same Better than Carlsbad

0% 25% 50% 75% 100% 125% 150% 175% 200%

Average rating = 94
Median rating = 100

Most Popular Responses	Average Rating
Oceanside	82.0
Del Mar	98.8
Moonlight	107.4
La Jolla	100
Mission	88.9
Newport	98.6
Huntington	75
Torrey Pines	88.3
Pacific Beach	109.1

Question 10: Which of the following services and amenities were most important to you in your choice to come to Carlsbad?

Question 10a: Carlsbad Village

Importance	Frequency
Very Important	18.9%
Somewhat Important	26.3%
Not important	44.8%
Non response	9.8%

Question 10b: Lifeguard Services

Importance	Frequency
Very Important	34.5%
Somewhat Important	25.3%
Not important	32.2%
Non response	7.8%

Question 10c: Wide Beaches

Importance	Frequency
Very Important	43.1%
Somewhat Important	38.4%
Not important	11.4%
Non response	7.1%

Question 10d: Availability of Hotels/Condos

Importance	Frequency
Very Important	16.9%
Somewhat Important	10.9%
Not important	59.8%
Non response	12.5%

Question 10e: Cleanliness of Beaches

Importance	Frequency
Very Important	81.9%
Somewhat Important	11.2%
Not important	2.1%
Non response	4.8%

Question 10f: Parking

Importance	Frequency
Very Important	55.5%
Somewhat Important	30.4%
Not important	8.9%
Non response	5.2%

Other responses: bathrooms, food, shower, surf

Question 11: Examining the beach where you are right now, suppose this beach was HALF as wide as it is now. How would that affect your number of visits to this beach?

Effect	Frequency
I would go about the same amount	41.5%
I would go somewhat (10%) less often	9.8%
I would go quite a bit (25%) less often	13.2%
I would go half as much	14.2%
I would still go, but less than half as much.	11.4%
I would not go at all	8.5%
other	0.4%
Non response	1.1%

Other responses: depends on what the city does and how they destroy the beach, I like it the way it is.

Question 12: Examining the beach where you are right now, suppose this beach was TWICE as wide as it is now. How would that affect your number of visits to this beach?

Effect	Frequency
I would go about the same amount	71.7%
I would go somewhat (10%) more often	11.6%
I would go quite a bit (25%) more often.	7.1%
I would go much often (50% or more)	7.5%
other	0.9%
Non response	1.2%

Other responses: would not like it, too long a walk from car, it would mess up the surf, would like it less, like it the way it is.

Question 13: Please check the most appropriate box (all reaches):

Type of trip	Frequency
I'm here on a day trip from my permanent home	54.4%
I'm on a trip/vacation to the area	40.7%
Non response	4.8%

Question 13: Please check the most appropriate box (reach 1):

Type of trip	Frequency
I'm here on a day trip from my permanent home	43.5%
I'm on a trip/vacation to the area	50.0%
Non response	6.5%

Question 13: Please check the most appropriate box (reach 2):

Type of trip	Frequency
I'm here on a day trip from my permanent home	55.3%
I'm on a trip/vacation to the area	40.2%
Non response	4.5%

Question 13: Please check the most appropriate box (reach 3):

Type of trip	Frequency
I'm here on a day trip from my permanent home	56.0%
I'm on a trip/vacation to the area	40.0%
Non response	4.0%

Question 13: Please check the most appropriate box (reach 4):

Type of trip	Frequency
I'm here on a day trip from my permanent home	60.5%
I'm on a trip/vacation to the area	50.0%
Non response	2.6%

Question 13: Please check the most appropriate box (reach 5):

Type of trip	Frequency
I'm here on a day trip from my permanent home	68.2%
I'm on a trip/vacation to the area	27.0%
Non response	4.7%

Question 14: Could you estimate how much you're spending, per person per day on your current trip on the following items and the percentage of this spending that occurs in Carlsbad? If you spent nothing, please put a zero in the box.

Spending Category	Average Spending	Percent Spent in Carlsbad	Average Spent in Carlsbad
Gas & Auto (including rental)	$7.79	41.8%	$3.26
Food from Stores and Take Out	$11.79	68.1%	$8.03
Beer, Wine, and Liquor	$4.04	59.4%	$2.40
Sit-down Restaurants	$11.49	62.1%	$7.13
Parking	$1.03	65.0%	$0.67
Sundries (Sun tan lotion, books, etc)	$3.00	47.0%	$1.41
Lodging	$26.94	79.8%	$21.51

If you are staying overnight in the area - away from your primary residence - please answer questions 15 to 17. Otherwise skip to question 18. (Results for questions 15 to 17 are from respondents only).

Question 15: How many days do you plan to be away from home on your current trip?

Average response = 7.2 days Median response = 6 days	
Number of Days	Frequency
2 days (overnight)	13.0%
3-4 days	17.2%
5-7 days	41.8%
8-10 days	11.7%
11-14 days	7.9%
14-21 days	2.5%
More than 21 days	5.9%

Question 16: How many days will you go to the beach on your current trip?

Average response = 5.5 days
Median response = 3.5 days

Number of Days	Frequency
One day or less	12.0%
2 days (overnight)	15.4%
3-4 days	27.4%
5-7 days	29.5%
8-10 days	5.4%
11-14 days	3.7%
14-21 days	2.9%
More than 21 days	3.7%

Question 17: Where are you staying? (all reaches)

Staying	Frequency
Camping	12.1%
Hotel	26.8%
House or Condo	34.6%
With Friends/Family	26.1%
Other	0.4%

Question 17: Where are you staying? (Reach 1)

Staying	Frequency
Camping	2.0%
Hotel	31.4%
House or Condo	43.1%
With Friends/Family	22.5%
Other	1.0%

Question 17: Where are you staying? (Reach 2)

Staying	Frequency
Camping	3.1%
Hotel	32.8%
House or Condo	34.4%
With Friends/Family	29.7%
Other	0.0%

Question 17: Where are you staying? (Reach 3)

Staying	Frequency
Camping	0.0%
Hotel	15.4%
House or Condo	53.8%
With Friends/Family	30.8%
Other	0.0%

Question 17: Where are you staying? (Reach 4)

Staying	Frequency
Camping	61.7%
Hotel	10.6%
House or Condo	12.8%
With Friends/Family	14.9%
Other	0.0%

Question 17: Where are you staying? (Reach 5)

Staying	Frequency
Camping	2.1%
Hotel	29.2%
House or Condo	31.3%
With Friends/Family	37.5%
Other	0.0%

Question 18: How important is visiting the beach for your trip/vacation?

Importance	Frequency
Very Important	58.0%
Somewhat Important	16.7%
Not important	2.7%
Non response	22.6%

Question 19: How old are you?

Age Group	Frequency
16-19	5.7%
20-24	9.1%
25-34	17.8%
35-44	31.9%
45-54	23.1%
55-64	7.5%
65 or older	3.9%
Non response	1.1%

Question 20: What is your ethnicity? (Note: you may check more than one box here)

Ethnicity	Frequency
White (Caucasian)	82.4%
Hispanic	9.1%
Asian	2.4%
Black (African American)	1.2%
Other	3.6%
Non response	1.4%

Question 21: What is your highest level of Education?

Education Level	Frequency
Did not finish high school	0.7%
High school	8.0%
Some college	30.1%
College degree	37.2%
Post graduate degree	22.6%
Non response	1.4%

Question 22: How many people are in your current household (people you live with and share financial resources)?

Number of People	Frequency
1	10.7%
2	24.6%
3	16.2%
4	29.4%
5-6	15.3%
7-9	1.4%
10 or more	0.7%
Non response	1.8%

Question 23: What would you estimate is the current yearly income of your entire household (before taxes)?

Income Range	Frequency
Less than $9,999	1.1%
$10,000-14,999	1.2%
$15-24,999	2.0%
$25-34,999	5.3%
$35,000-49,999	8.9%
$50,000-74,999	17.4%
$75,000-99,999	14.2%
$100,000-149,999	19.9%
$150,000 or more	21.9%
Non response	8.0%